eMaryland M@rketplace

Government User Quick Reference Guide

Creating a New Bid Solicitation

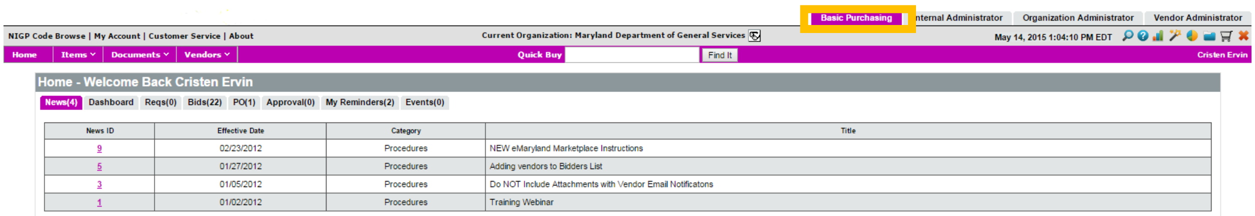
This quick reference guide will walk you through the process of creating a new bid solicitation from scratch. Throughout the guide, you will see Tips noted in green. These are suggestions provided based on system usage and vendor feedback.

Contents

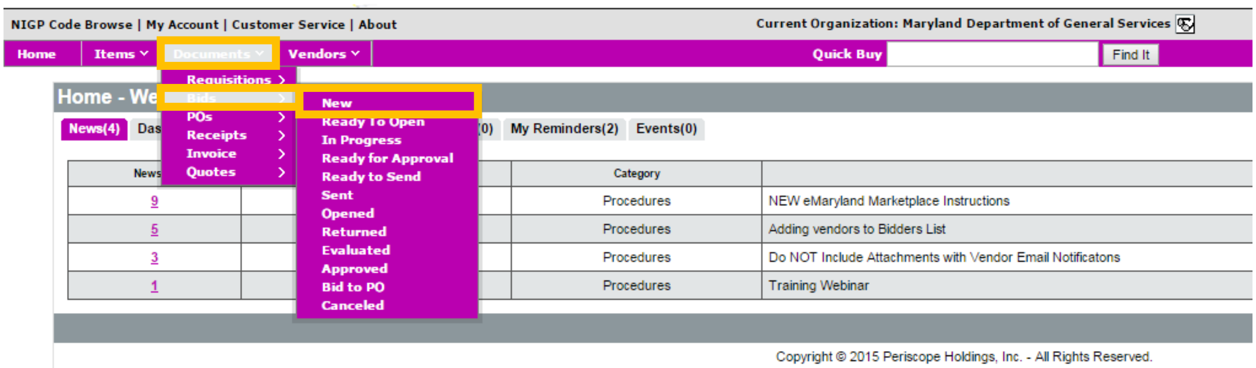
Create New Bid

To create a new bid solicitation, you must be logged into eMaryland Marketplace.

After logging into eMaryland Marketplace, select the Basic Purchasing tab at the top left of your screen. Note: if you have only been assigned the basic purchasing user role, the Basic Purchasing tab will be your only option.



From the Documents drop-down box, select Bids then New.



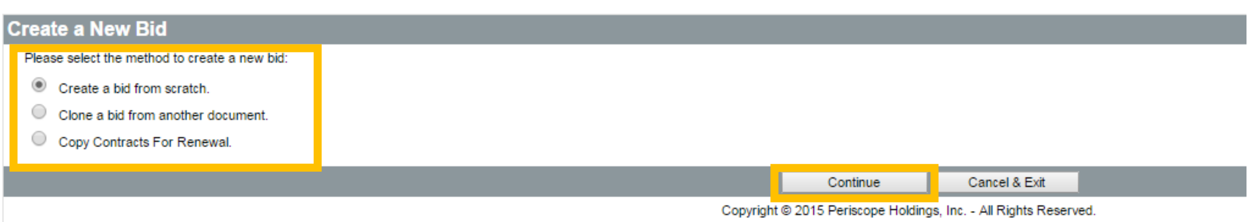
You will be asked how you would like to create a new bid.

Create a bid from scratch – you will create a bid using a blank template.

Clone a bid from another document – you can create a bid using a previously created bid as a template. Select information will automatically be pre-filled and you will have the ability to add, change, or delete information from the template.

Copy Contracts For Renewal – you may copy an existing contract if awarded in eMaryland Marketplace.

To create a new bid solicitation from scratch, select Create a bid from scratch. Click **Continue**.

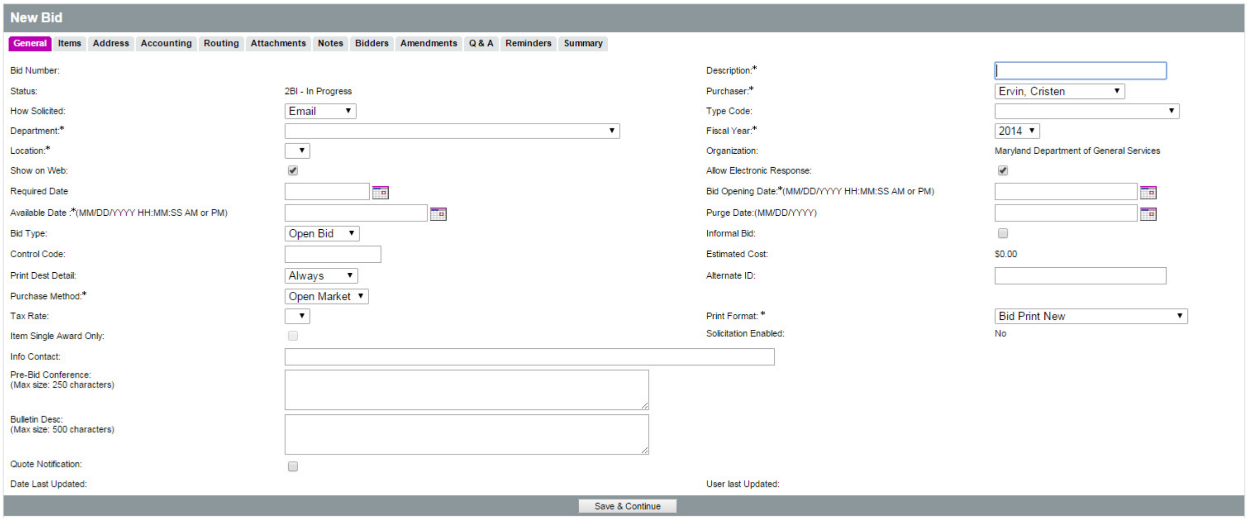


The New Bid screen will appear. You will proceed through a series of tabs to create your solicitation. Remember to save after completing each tab.

General Tab

The first tab is the General tab. Fields marked with an asterisk (*) are required. All other fields are optional; however, may provide relevant information to anyone viewing the bid opportunity.

Enter all relevant information for your bid solicitation.



General Screen Field Descriptions

Bid Number – eMaryland Marketplace will automatically generate and assign a bid number once the General tab is completed.

Status – Until the solicitation is published, the bid will have the status of *In Progress*. After the bid is published, the status will change to *Sent*.

How Solicited – This is notifying the vendors of the method they will be notified of the solicitation. Select Email, indicating that vendors will be notified via email through eMM.

Department* - From the drop-down menu, select the organizational department who is issuing the bid solicitation.

Location* – From the drop-down menu, select the organizational department location who is issuing the bid solicitation. *Note: you must select a Department first.*

Show on Web – Check if you would like the bid solicitation to be displayed and seen by vendors on eMaryland Marketplace. *Note: this option is automatically selected by default.*

Required Date – Informs vendors of when the buying organization anticipates needing the product/service.

Available Date* - The date the solicitation will be made available on eMaryland Marketplace. This can be set for a time in the past to make it available immediately upon Sending, or for a future date and time.

Bid Type – Select Open Bid or Closed Bid from the drop-down menu.

Open Bid – Bid is open for all vendors to view and submit a response.

Closed Bid – Only vendors added to the Bidder tab may view and respond to the solicitation.

Control Code – Open field to be used per buyer discretion.

Print Dest Detail – Select Always.

Purchase Method* - From the drop-down menu select from the available purchase methods.

Tax Rate – Not used.

Item Single Award Only – When checked, items may only be awarded to a single vendor.

Info Contact – Enter the contact information for the individual that may be contacted for bid information.

Pre-Bid Conference – Enter details of pre-bid conference. Allows up to 250 characters.

Bulletin Desc – Adds additional text to vendor notification email. Allows up to 500 characters.

Quote Notification – Check if you would like to receive an email notification when a bidder has submitted an electronic bid.

Date Last Updated – System generated. List the last date the bid solicitation was updated.

User Last Updated – System generated. List the last user to update the bid solicitation.

Description* – Provide a description of the bid you are soliciting. Vendors may search for bids using the description entered in this field. Tip: It is important to enter a description that is relevant to the vendor so they can easily find your solicitation.

Purchaser* - This will automatically prefill to the user logged in; however, you can assign a different purchaser at any time. Tip: If the assigned purchaser is will be unable to attend to the bid for a period of time (e.g. going on vacation), prior to leaving they may assign a different purchaser to watch over the bid in their absence.

Type Code – Select the best option that identifies the type of bid.

Fiscal Year* – This will default to the current fiscal year. When available, future fiscal years may be selected for procurements to be awarded in upcoming fiscal years.

Organization – The Organization will pre-fill based on your assigned organization. If you have been assigned multiple organizations, this will pre-fill to the organization you currently have selected.

Allow Electronic Response – A check-mark in this box allows vendors to submit bids online through eMaryland Marketplace. To uncheck the box, click on the box and the check-mark will disappear. If this box is not checked, vendors will not be able to submit bids through eMaryland Marketplace.

Bid Opening Date – This is the date the bid will close to the public. Vendors will not be able to submit bids online past this time and date. When completing this field, use the calendar icon to select the time and date. You must first select the time your bid will close then click on the date.

Purge Date – The date that the bid is to be purged from the system.

Informal Bid – Check this box if the solicitation is an informal bid process. This will allow buyers to access and open the bids before the bid opening date/time.

Estimated Cost – Calculated by system if a unit cost is entered for line items.

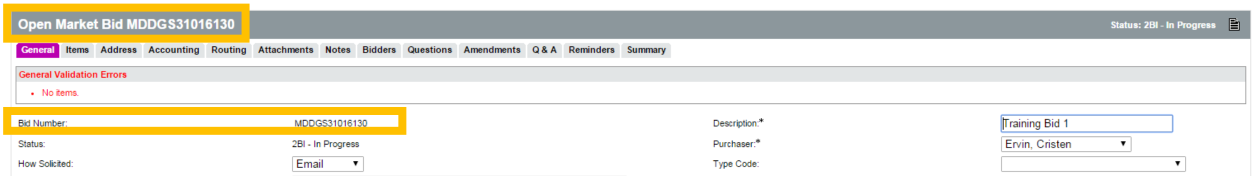
Alternate ID – Additional identification field that may be used however the buying organization deems appropriate. Tip: use this field to enter an ITB or RFQ number.

Print Format* - From the drop-down menu, select a defined print format.

After completing all fields, select **Save & Continue**.

You will remain on the General tab. An eMaryland Marketplace bid number has been assigned. The bid number will also be displayed in the grey header labeled Open Market Bid and next to the Bid Number field on the General tab.

You may see a General Validation Error in red. This error message displays to remind you that these items must be completed prior to sending the bid solicitation.



Click on the Items tab.

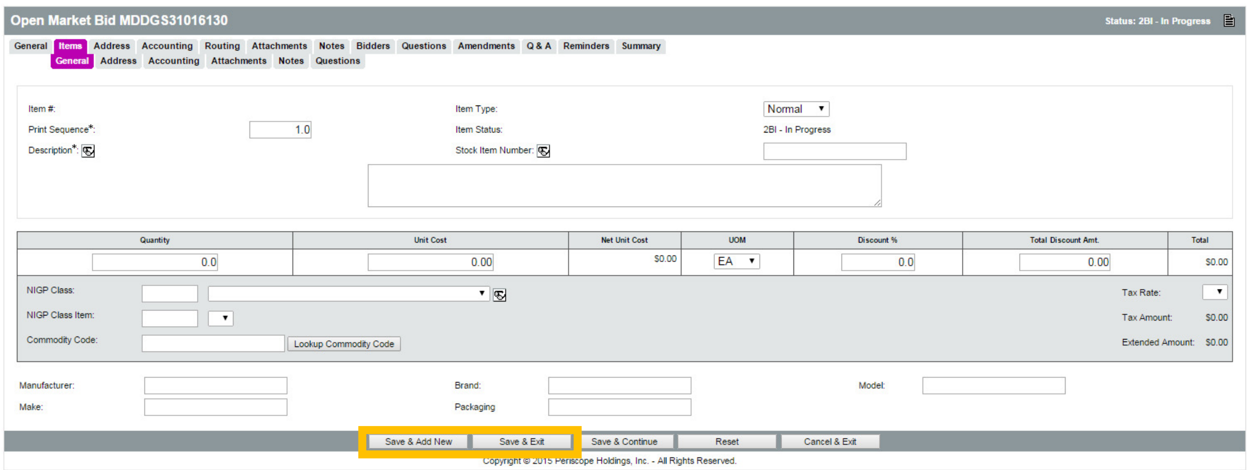
Items Tab

The Items tab is where you enter the line items for the products or services you are procuring.

To enter a new item, click **Add Item**.

A blank item entry form will open allowing you to enter the information for your items (one at a time).

Complete all necessary fields. Fields marked with an * are required.



Item Field Descriptions

Item #* - Line item number assigned by the system.

Item Type – Select Normal.

Print Sequence* – The print sequence for the item. The item # is the default value for this field, but the user can change this field if the print sequence needs to be different from the item number sequence.

Item Status – Current status of line-item.

Description* – Enter a detailed description of the item.

Stock Item Number – Used if the item is a stock item.

Fixed Asset – Not used.

Quantity – Enter the quantity of the item being requested.

Unit Cost – (Optional) You may enter the estimated cost of the item. Later you have the ability to choose if the vendor can view this information.

Net Unit Cost – The calculated net unit cost of the item. This will automatically calculate by the system.

UOM – Unit of Measure. Select the unit of measure for the items being purchased. The default UOM s each (EA).

Discount % - (Optional) The discount percent for the item.

Total Discount Amount – Total discount amount, based on discount percent. This value is automatically calculated by the system.

Total – Total cost before tax. This field is automatically calculated by the system.

NIGP Class – The three digit class code associated with the item. For more information on commodity codes, refer to the Commodity Codes Quick Reference Guide.

Tax Rate – (Optional) The tax rate for the item.

NIGP Class Item – The two digit class code associated with the item (follows the three-digit code previously selected). For more information on commodity codes, refer to the Commodity Codes Quick Reference Guide. Tip: Be sure to select codes that are relevant and specific to the item/services being purchased. Vendors receive notifications based on these codes and failure to enter proper codes will result in proper vendors not being notified.

Tax Amount – The total tax amount based on the tax rate.

Commodity Code – Leave this field blank.

Extended Amount – The total extended amount of the item based on total for the item and the tax rate. This field is automatically calculated by the system.

Manufacturer – (Optional) Enter the manufacturer name if a specific manufacturer is requested.

Brand – (Optional) Enter the brand name is a specific brand name is requested.

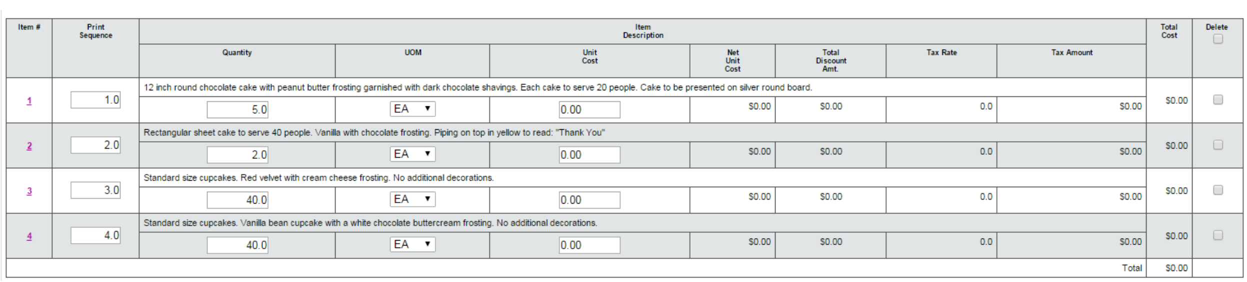
Model – (Optional) Enter the model name or number if a specific model is requested.

Make – (Optional) Enter a specific make if a specific make is requested.

Packaging – (Optional) Enter packaging requirements if specific packaging is requested.

When you have finished entering all line item information click **Save & Add New** to enter additional items or **Save & Exit** when you have entered all line items.

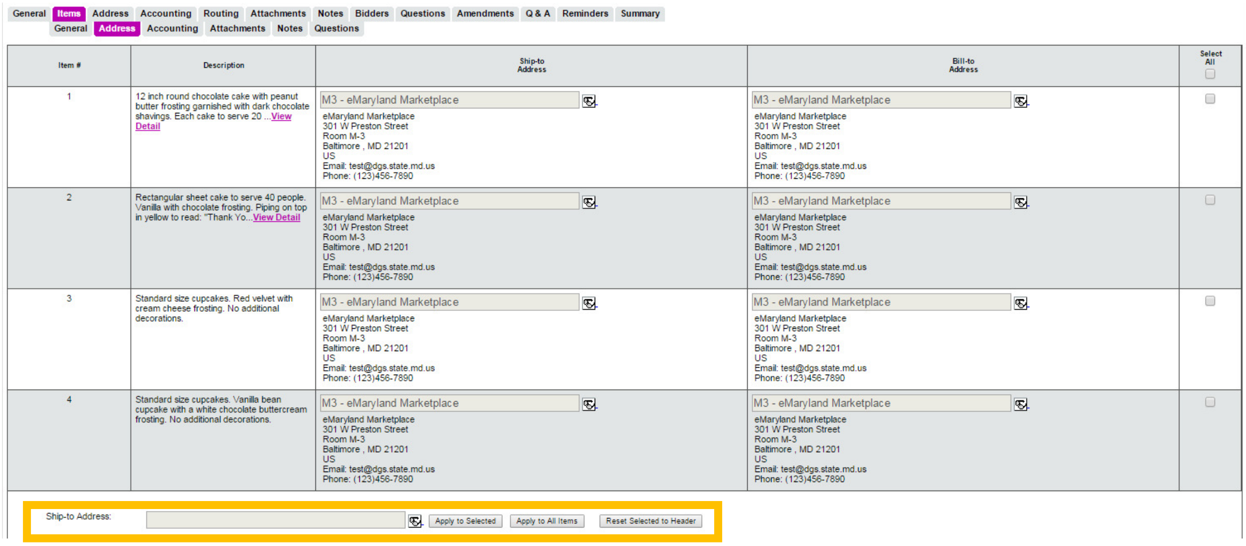
All line items will display on the screen.



Item #	Print Sequence	Item Description							Total Cost	Delete
		Quantity	UOM	Unit Cost	Net Unit Cost	Total Discount Amt.	Tax Rate	Tax Amount		
1	1.0	12 inch round chocolate cake with peanut butter frosting garnished with dark chocolate shavings. Each cake to serve 20 people. Cake to be presented on silver round board.							$0.00	
		5.0	EA	0.00	$0.00	$0.00	0.0	$0.00		
2	2.0	Rectangular sheet cake to serve 40 people. Vanilla with chocolate frosting. Piping on top in yellow to read: "Thank You"							$0.00	
		2.0	EA	0.00	$0.00	$0.00	0.0	$0.00		
3	3.0	Standard size cupcakes. Red velvet with cream cheese frosting. No additional decorations.							$0.00	
		40.0	EA	0.00	$0.00	$0.00	0.0	$0.00		
4	4.0	Standard size cupcakes. Vanilla bean cupcake with a white chocolate buttercream frosting. No additional decorations.							$0.00	
		40.0	EA	0.00	$0.00	$0.00	0.0	$0.00		
								Total	$0.00	

Items Tab - Address

You can change the billing and/or shipping addresses for individual line items if necessary.

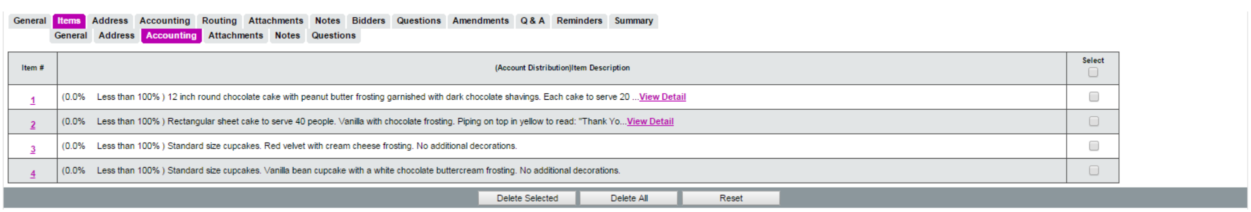


You may change each address individually by selecting the icon next to the address you would like to change.

You may also change the address on multiple items at the same time by using the search boxes at the bottom of the screen. Select the items you would like to change the address for and choose a new address by using the Ship-to-Address and/or Bill-to-Address boxes at the bottom of the screen. To search for addresses, click on the next to the address box. After selecting a new address, click **Apply to Selected**.

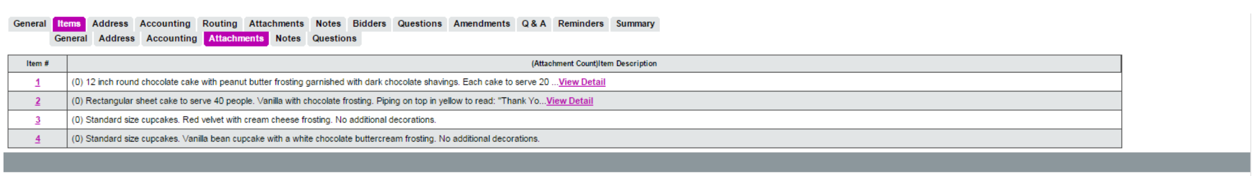
Items Tab - Accounting (not required)

This tab is not used.



Items Tab – Attachments (not required)

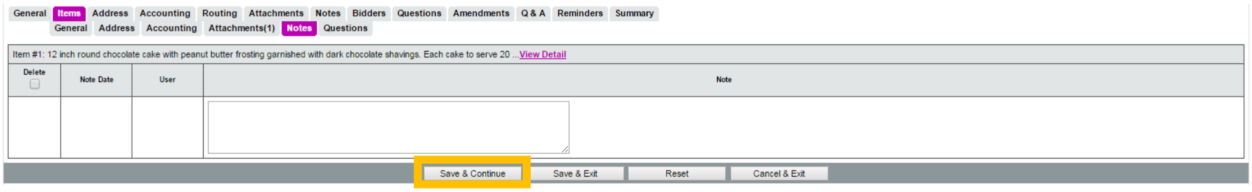
You have the option of attaching documents directly to a line item in the bid.



Items Tab - Notes (not required)

You may add notes to specific line items.

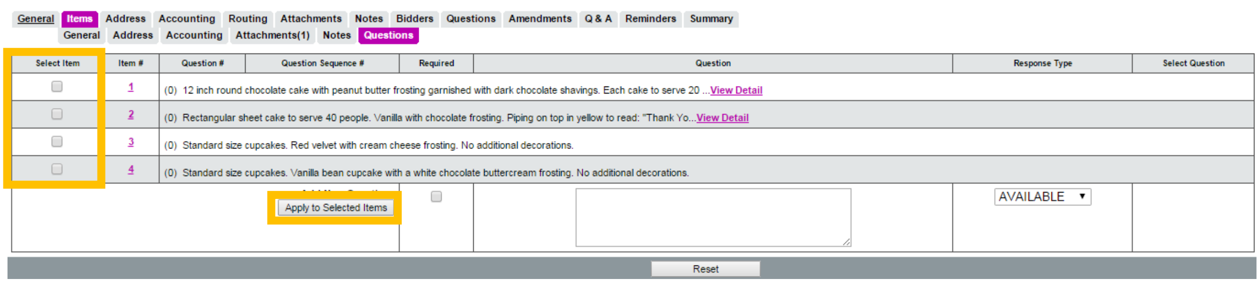
Enter the note in the box. Click **Save & Continue**.



Items Tab – Questions (not required)

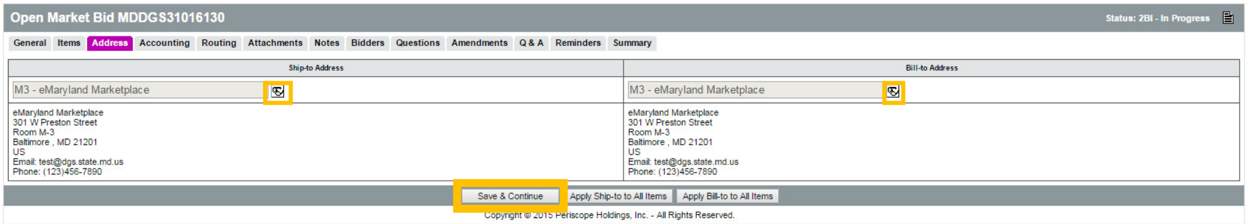
You may apply questions to be answered for specific line items.

Enter a question in the box provided. Select the line(s) to apply the question. Click **Apply to Selected Items**.



Address Tab

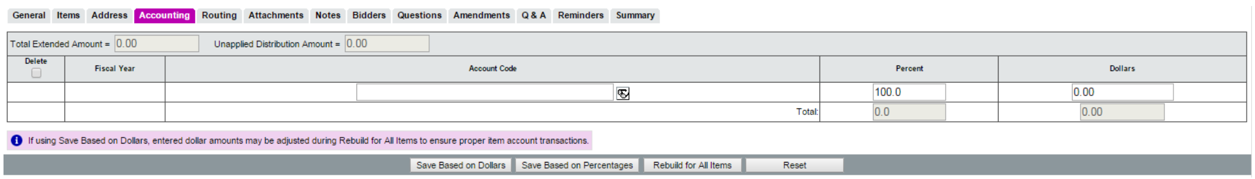
You may change the Ship-to-Address and/or the Bill-to-Address.



To change either address, select the  next to the address you would like to change. Search for and select a new address. Click **Save & Continue**.

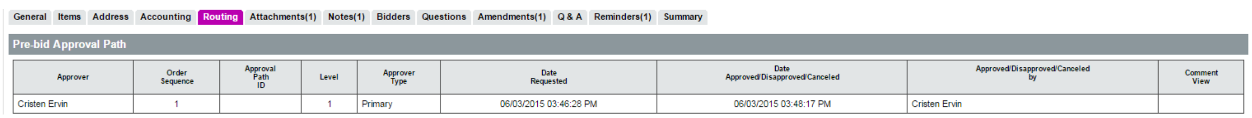
Accounting Tab

This tab is not used.



Routing Tab

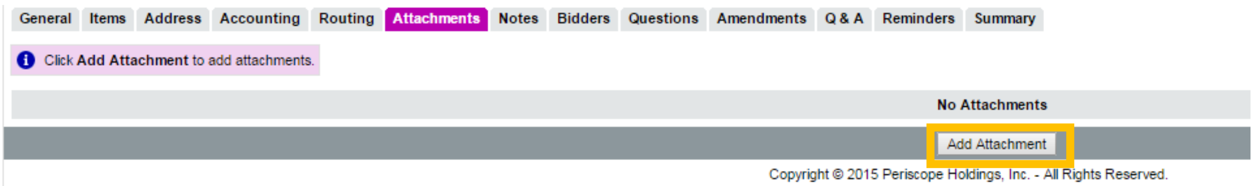
The routing tab shows the rout of the approval process. The routing that a bid must follow for approval is determined by the bid's approval path. The approval path for a bid is displayed on the Routing Tab of the bid. This tab will remain blank until an approval path is determined when the bid is submitted for approval. Once the bid approval path as been established, it will display in this tab.



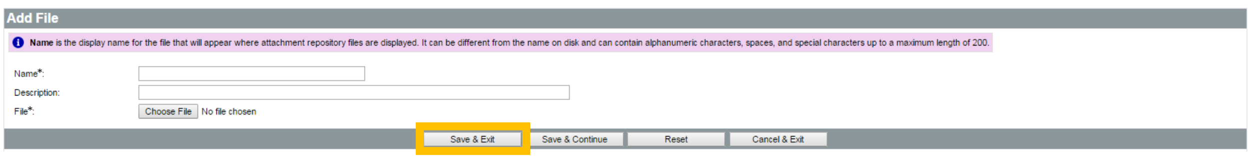
<u>Attachments</u>

Use this tab to add attachments to the bid. Attachments could include Terms & Conditions, Bid Specifications, or any other documents necessary to distribute to vendors.

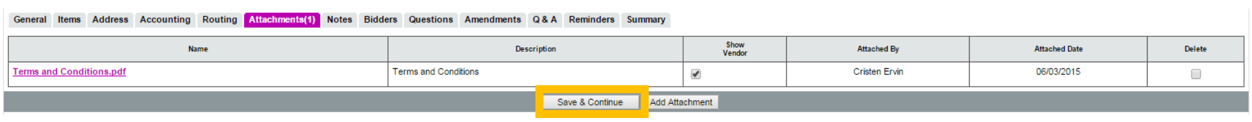
Select **Add Attachment**.



Select Choose File and pick a file to upload. You may enter a description of the file you are uploading in the Description box. Click **Save & Exit**.



The new attachments will display on the screen.



Be sure to leave the box checked under Show Vendor. You may also delete items by selecting the box under Delete and clicking **Save & Continue**.

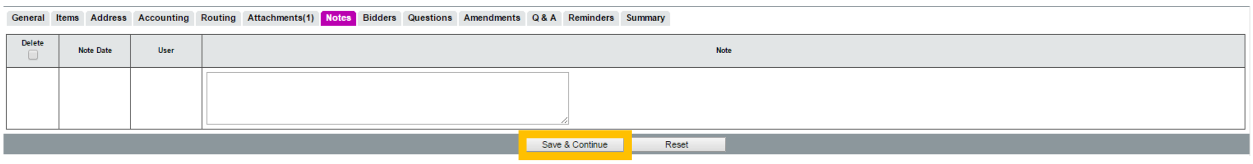
Notes Tab

The Notes Tab allows you to add, edit and delete notes to provide additional information or special instructions. Notes added from the Notes Tab are for the overall bid and do not pertain to specific items on the bid.

To enter a Note, enter your note information in the Note box and click **Save & Continue**.

To edit a note, enter the changes in the Notes field that you are the author. You cannot edit notes where you are not identified as the user in the User field. When you have completed your changes, select Save & Continue.

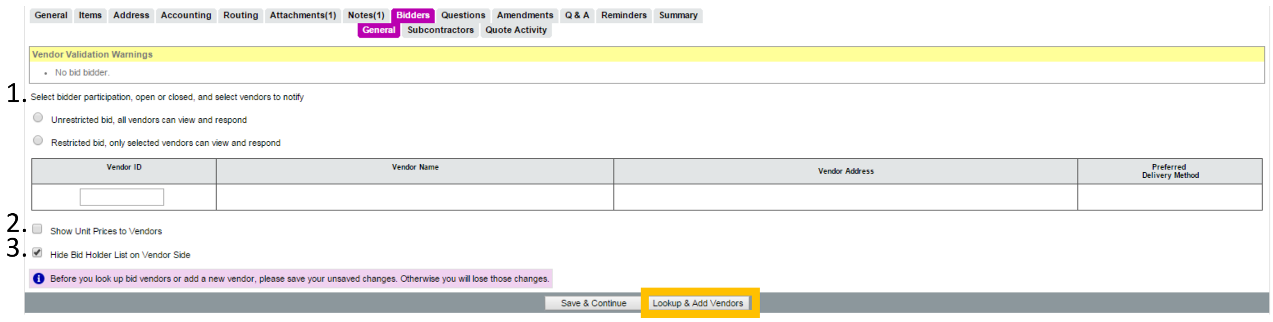
To delete a note, check the box in the Delete column of the note to be deleted and select Save & Continue. You cannot delete notes where you are not identified as the user in the User field.



Bidders Tab

The Bidders Tab allows you to select who will be able to view, and quote the bid. This tab also allows you to select the vendors that will be notified of the bid opportunity. **Notifications are sent to vendors on the Bidders tab only.**

If you have selected "Closed Bid", here is where you will add the vendors that you want the bid to be open to. If you have set the bid to "Open Bid" on the General Tab, the bid will be open and available to all vendors allowing anyone to search for the bid and submit a response; however, vendors will not receive notification unless you add them to the Bidders tab.

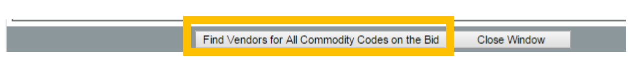


1. Select bidder participation, open or closed, and select vendors to notify.
   Unrestricted bid – all vendors can view the bid and respond.
   Restricted bid – only selected vendors can view and respond to the bid.
2. Show Unit Prices to Vendors – Selecting this option allows vendors to see the estimated unit prices entered when entering the items.
3. Hid Bid Holder List on Vendor Site – Selecting this option prevents other users from being able to see the Bid Holder List. The Bid Holder List is a list of vendors who have acknowledged the bid.

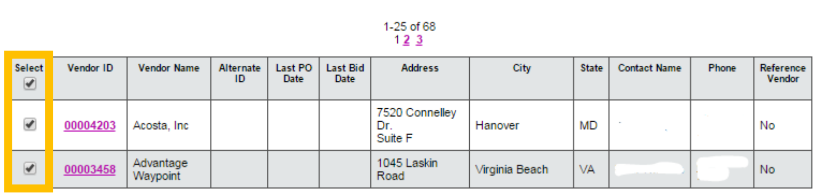
   This list is available to the public through the Open Bids search function on the eMaryland Marketplace homepage (www.emarylandmarketplace.com). Tip: Vendors are able to use this list to connect with potential sub-contractors, prime-contractors, or partners.

Select vendors to notify.

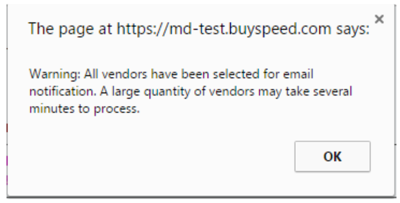
To select vendors to notify, click **Lookup & Add Vendors**. The vendor search screen will appear. First, you want to add vendors who have registered for the commodity codes you entered for your line items. Scroll to the bottom of the screen and click **Find Vendors for All Commodity Codes on the Bid**.



The results of the search will populate at the bottom of the screen. Click the check-box under the Select column to select all vendors on the list. *This will select all vendors on all pages so there is no need to select pages individually.*



If a large quantity of vendors are being selected, you may receive a message stating "Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process." Click OK. Click Save & Exit.



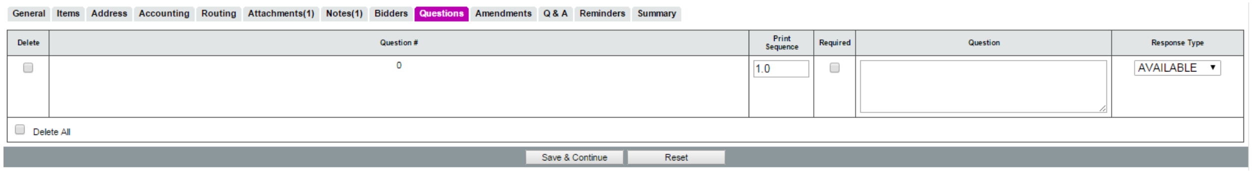
The vendors will be added to the Bidders tab.

You may add additional vendors to the Bidders tab by selecting Lookup & Add Vendors then performing a search for vendors using any of the search criteria provided. When you are finished adding vendors, click Save & Continue.

You may delete vendors from the Bidders tab as needed. Click on the box next to the vendor you would like to delete and click Save & Continue.

Questions Tab

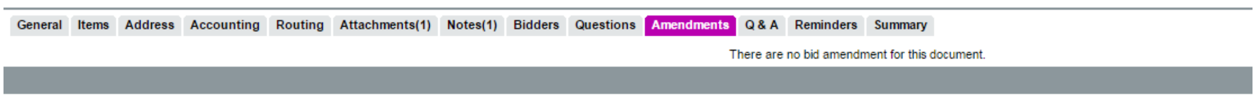
The Questions tab allows you to create questions for the vendor to answer with a supplied response type. You can make these questions a required response by checking the Required box.



To enter a question, enter the question information in the question box. Select a response type from the drop-down menu.

Amendments Tab

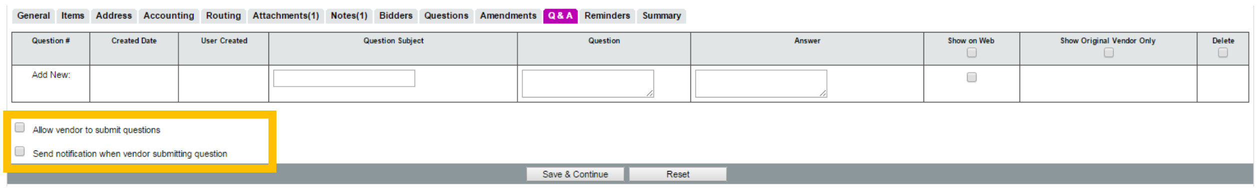
If amendments are added to the bid, they will be listed on this tab. You may only enter an amendment after a bid is published. For instructions on adding an amendment, refer to the Creating a Bid Amendment Quick Reference Guide.



Q & A Tab

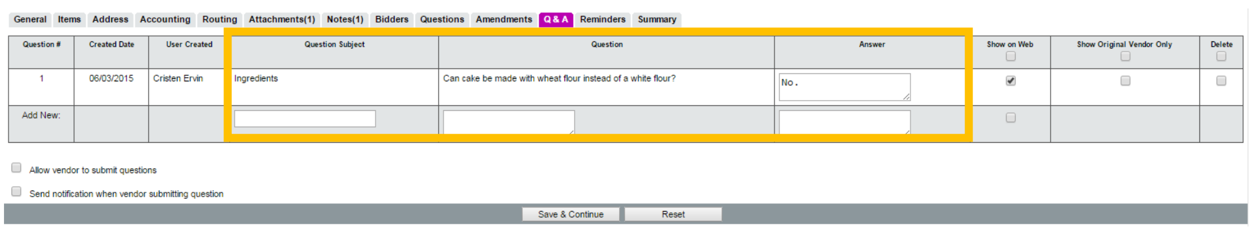
The Q & A (Questions & Answers) tab allows vendors to submit questions to the procurement officers. In return, the procurement officers provide answers to the questions on this tab. Vendors are able to submit questions up until the bid opening date/time. There is no option to select a cutoff time in the system.

To allow vendors to submit questions, select Allow vendor to submit questions. If you would like to be notified when a vendor submits a question, select Send notification when vendor submitting questions.



Tip: For transparency, you may advise all vendors to use this option to submit all questions. If you do receive questions from vendors outside eMaryland Marketplace, you may enter questions on behalf of the vendors. For example, if questions are asked during the pre-bid meeting you can address the answers on the Q & A tab.

To enter a question, type in the Question Subject, Question, and Answer in the boxes provided. Click Show on Web so vendors can view the questions. Click **Save & Continue**.



Questions and answers will display on the Q & A tab once entered.

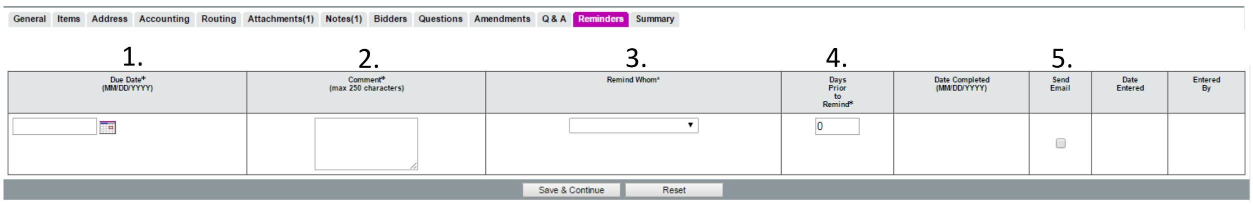
When answering questions, you have the option to Show Original Vendor Only. Selecting this box prevents all other interested vendors from seeing the question and answer.

Reminders Tab

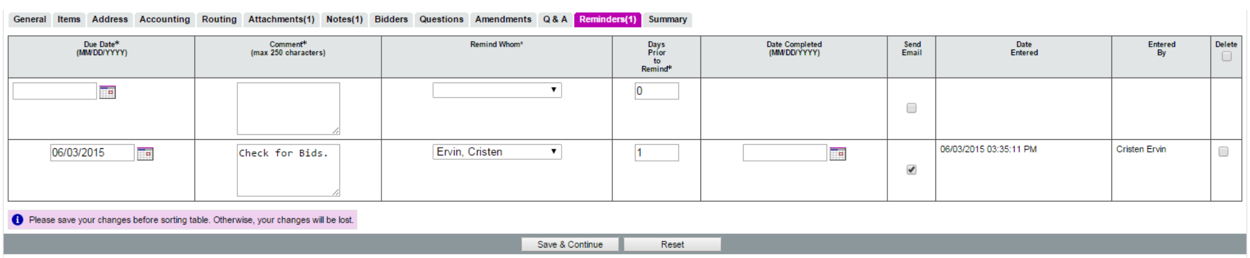
The Reminders tab allows you to set reminders for the bid.

1. Under Due Date, select the date the task is to be completed.
2. Enter the task information in the Comment box.
3. Select who you would like to remind (yourself or someone else in the eMM system) from the drop-down box under Remind Whom.
4. Select how many days before the Due Date you would like the reminder to be sent.
5. Be sure to select the Send Email box to have the reminder sent to you via email.

After entering all reminder information, click **Save & Continue**.



The reminder will display on the screen.



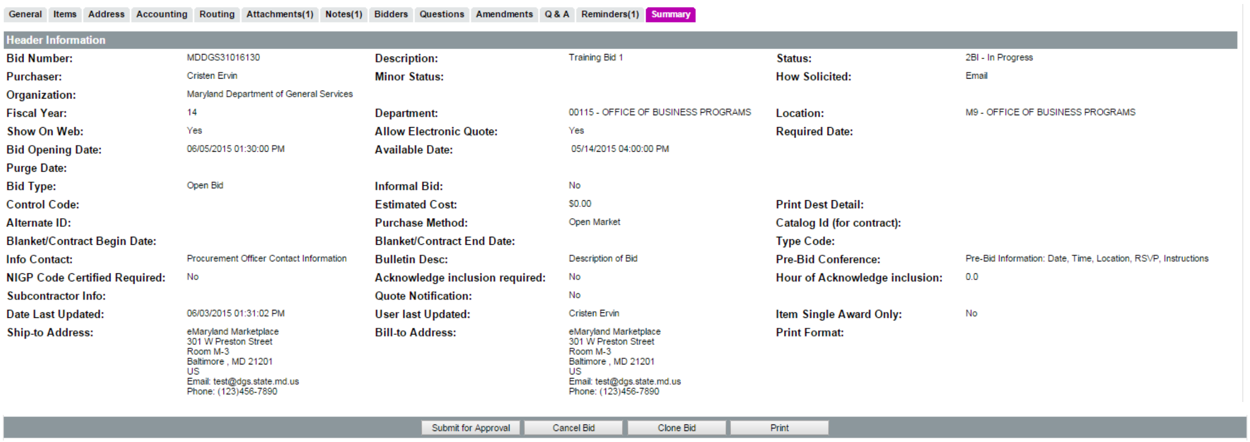
Tip: When using the Reminders tab, some suggested reminders include:

- Pre-bid reminder.
- Reminder for the last day to accept questions from vendors.
- Reminder to check a day or so before bid opening to review the number of quotes received.

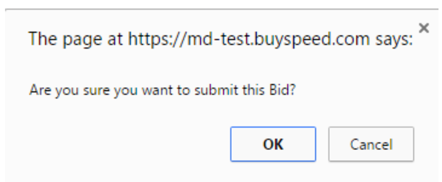
Summary Tab

The Summary tab displays summary information for the bid.

Look over the summary page to ensure all information is correct. Click **Submit for Approval**.



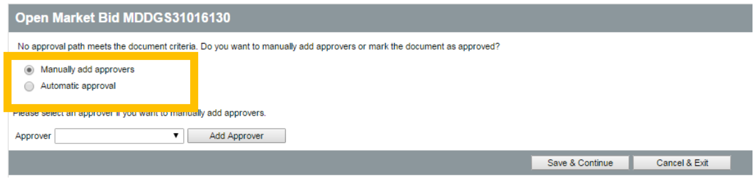
You will receive a message asking "Are you sure you want to submit this Bid?" Click OK.



You will then be prompted to select approvers.

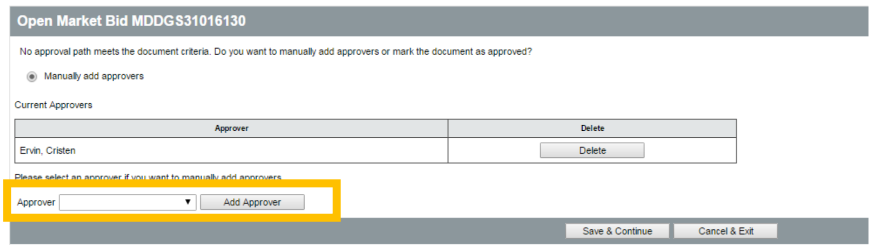
Bid Approval

You can manually add approvers or select automatic approval to bypass the approval process.



If you select Automatic Approval you may skip to page 20.

To manually add approvers, select an approver from the Approver drop-down box. Click **Add Approver**.



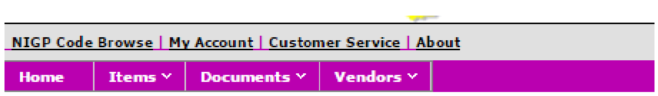
The approver will display on the screen. Select **Save & Continue**. If you wish to delete an approver at this time you may do so by clicking **Delete** next to the approver.

The assigned approver would then login and select the bid to approve.

After selecting Approve, click **Save & Exit**.

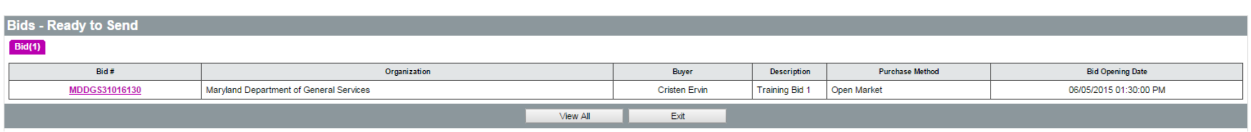
At this point the bid has been approved but not sent (made available to the public).

To Send the bid, Log into eMaryland Marketplace and search for the bid. You may search by using the icon in the upper right of the screen or using the Documents drop-down box on the upper left of the screen.



To use the Documents drop-down box, select Documents → Bids → Ready to Send.

Your bid will be displayed on this screen.



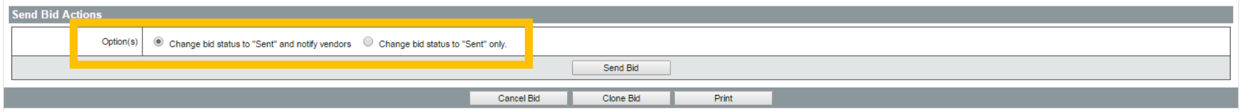
Select the Bid # to open the bid.

<u>Send Bid</u>

You will have the option to *Change bid status to "Sent" and notify vendors* or *Change bid status to "Sent" only*.

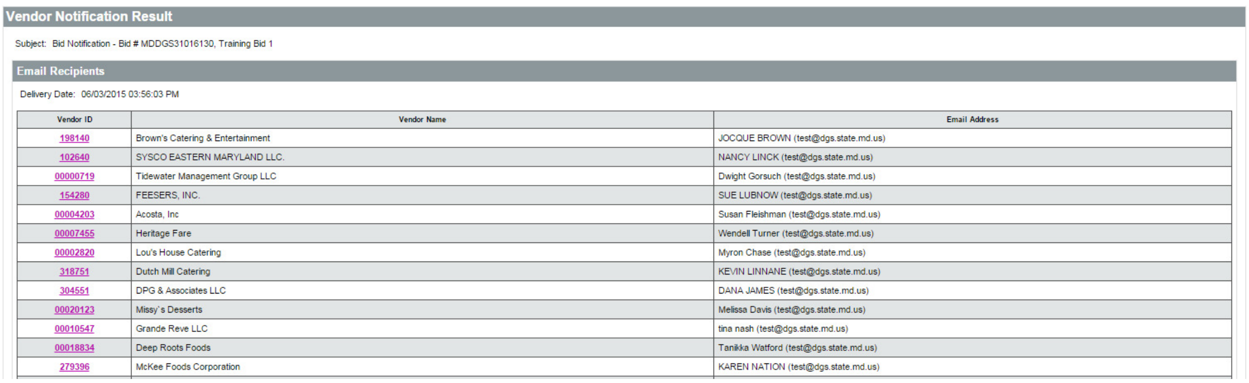
To notify vendors, select *Change bid status to "Sent" and notify vendors*. Click **Send Bid**.

Depending on the number of vendors selected to notify, this process may take a few minutes.



The Vendor Notification Results will display.

Tip: This will be the only time all vendors will be displayed on one screen. You may want to print this list for future reference.



Vendor Notification Result

Subject: Bid Notification - Bid # MDDGS31016130, Training Bid 1

Email Recipients

Delivery Date: 06/03/2015 03:56:03 PM

Vendor ID	Vendor Name	Email Address
198140	Brown's Catering & Entertainment	JOCQUE BROWN (test@dgs.state.md.us)
102640	SYSCO EASTERN MARYLAND LLC.	NANCY LINCK (test@dgs.state.md.us)
00000719	Tidewater Management Group LLC	Dwight Gorsuch (test@dgs.state.md.us)
154280	FEESERS, INC.	SUE LUBNOW (test@dgs.state.md.us)
00004203	Acosta, Inc	Susan Fleishman (test@dgs.state.md.us)
00007455	Heritage Fare	Wendell Turner (test@dgs.state.md.us)
00002820	Lou's House Catering	Myron Chase (test@dgs.state.md.us)
318751	Dutch Mill Catering	KEVIN LINNANE (test@dgs.state.md.us)
304551	DPG & Associates LLC	DANA JAMES (test@dgs.state.md.us)
00020123	Missy's Desserts	Melissa Davis (test@dgs.state.md.us)
00010547	Grande Reve LLC	tina nash (test@dgs.state.md.us)
00018834	Deep Roots Foods	Tanikka Watford (test@dgs.state.md.us)
279396	McKee Foods Corporation	KAREN NATION (test@dgs.state.md.us)

Select **OK** to return to the bid summary screen.

You will notice that the Status has changed to *Sent*.